

****To use the email templates, either copy-paste the below content into your email tool - or click **File → Download as Word Doc** to further edit

Resource → [How to Create a Sequence in ConvertKit](#)

- **Email #1 - Thank You & What to Expect**

Subject Idea: Thank you

Content:

I appreciate you taking the time to subscribe to NEWSLETTER NAME. Each week, I send out a short email that includes:

- Content #1
- Content #2
- Content #3

Every newsletter is meant to help you on your path to financial freedom and if there's ever anything I can help with or answer for you, reply to the emails and I'll get right back to you!

Have a great day,

- **Email #2 - About**

Subject Idea: Who is NAME/FIRM NAME?

Content:

So that I'm not a random name that keeps popping up in your inbox every week, I wanted to share a quick story about how I started XXXX firm name

*2-8 sentences about how you got to where you are today / why planning matters to you

*Details about personal life - *people do business with other people*, make a connection

Closing Call-To-Action:

If you feel like you'd benefit from a quick meeting with a financial advisor, here's a link to my calendar: *insert calendar link*

- **Email #3 - Value & Ask**

Subject Idea: It's time

Content:

Do you know how much you need to have saved to retire?

If not, don't worry.

A lot of people are in the same situation.

Money's stressful and it can be hard to take the first step & face the realities of retirement.

Luckily, there are some things you can do to prepare:

- Short bullet point checklist with easy tips to help someone feel more confident about retirement
- Asset mapping, beneficiaries, LTC
- Example
- Example

I know things like this can feel overwhelming, which is part of the reason I became a financial advisor.

It's my life's mission to help as many people retire with confidence as possible and if you think you'd benefit from talking with an advisor to see if we're the right fit, here's a link to schedule a call:

Schedule a Call - insert link

There's no obligation and no product pitches - just an honest conversation to see if we can add value to your life. If we can't, we'll happily share contact information to another expert who may be a better fit.

If you have any questions, don't hesitate to reach out.

Have a great day,